Roles Description Template

The roles description template takes the workflow diagram created in the previous sub-tasks and assigns additional information (i.e., roles, performance support, applications, physical environment). The roles are depicted by a technique called Swimlanes. By re-drawing the workflow diagram into a Swimlane Diagram, the Business Process flow is still understood but supporting information is provided pictorially so that the implementation implications for the Business Capability may be better understood. Synergy for tasks are identified. All the tasks within one lane share the attributes of the driver (or entity) for that lanes (i.e. role).

I. IPT Name:		
II. Deliverable Name: Roles Description		**Date Completed:**
III. Contact Information		
	Name	Channel Unit
IPT Sponsor		
Channel Task Manager		
CIO Task Manager		
Contractor Task Manager		
IV. Task Order Number:		

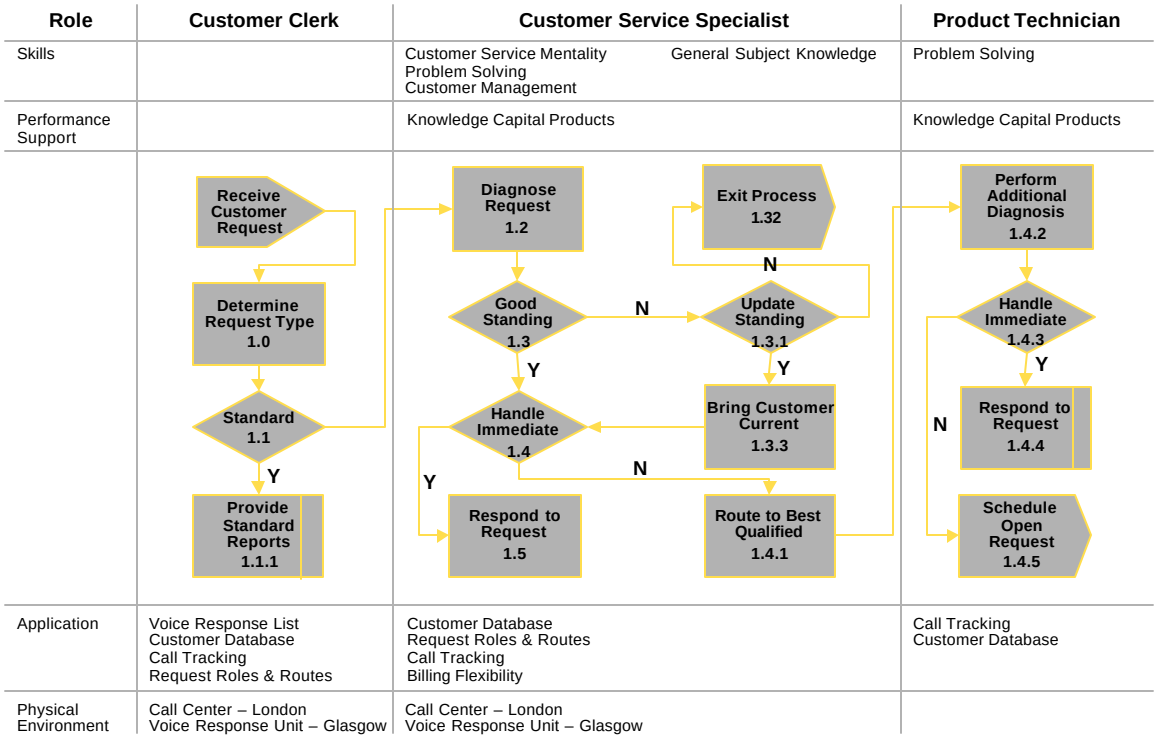


Figure: Swimlane Diagram

The Swimlane Diagram provides detailed information which can help to inform design teams of the sequence that the tasks within a process are executed, the resources required to execute the task, performance support required to execute the task, and the physical environment required to execute each task. The information is produced in an integrated fashion (the Swimlane Diagram) to show the 'bigger picture" to design teams, but effectively from this diagram, detailed information can be derived for the design teams, for example:

Interaction	Role			Application					Physical Envir		Skills				Perf. Support	
Tasks	Customer Clerk	Customer Service Specialist	Product Technician	Voice Response List	Customer Database	Call Tracking	Request Routes Routines	Billing Functionality	Call Centre - London	Voice Response Unit - Glasgow	Customer Service Mentality	Problem Solving	General Subject Knowledge	Customer Management	Yes (Knowledge Capital Products)	No
Receive Customer Req	x			x	x	x	x	x		x						x
Determine Req Type	x			x	x	x	x	x		x						x
Standard	x			x	x	x	x	x		x						x
Provide Standard Rpts	x			x	x	x	x	x		x						x
Diagnose Request		x			x	x	x	x	x		x	x	x	x	x	
Good Standing		x			x	x	x	x	x		x	x	x	x	x	
Handle Immediate		x			x	x	x	x	x		x	x	x	x	x	
Schedule Open Request			x		x	x		x				x			x	

Figure : Objectives of a Swimlane Diagram

Objectives of a Swimlane Diagram

As indicated in the figure above, the objectives of the Workflow Diagram or process model are to illustrate the flow of work in the new Business Processes. The Swimlane Diagram extends the process flow to emphasize interactions of all elements of the Business Capability. Its main objectives are:

- To illustrate the interactions between the Business Process and the application, users, Physical Environment and Technology Infrastructure.
- To show an integrated view of the Business Capability.
- To illustrate the implementation implications of the new Business Process Designs.
- To provide a starting point for further design of the Application, Human Performance and Technology Infrastructure elements of the Business Capability.

Current vs. "To-Be" Swimlane Diagrams

Swimlane Diagrams may be created when analyzing a Current Business Capability or when designing a new Business Capability. The information contained in the Swimlane Diagram is very detailed (task level) so it may not always be created for current analysis. This will depend on the cost benefit of doing the detailed analysis.

Usually, the expected approach for creating a Current Swimlane Diagram are different from those for creating a "To-Be" Swimlane Diagram.

When creating a Swimlane diagram to depict a current Business Capability, consider:

- Where are the hand-offs in the Business Process?
- How does the Business Process operate in terms of cost, quality and time?
- How does the current capability interact?
- Which tasks are critical?
- Which critical tasks have potential for automating?
- Where are performance barriers in the Business Process?

When designing a Swimlane diagram to depict a new Business Capability, consider:

- Who will operate the Business Processes?
- How will the new Business Process designs be supported by applications and technology infrastructure?
- Have all the Performance Barriers been eradicated?

Creating Swimlane Diagrams

The following text explains the process to go through in documenting Swimlane Diagrams using the above example.

To create a Swimlane Diagram:

- Understand the process model or workflow diagram. Read all supporting documentation to understand dependencies between tasks and why they are sequenced in such a way and any important Business Policies that may impact the operation of the Business Process.
- Decide on the driver for lanes on a Swimlane Diagram. Most typically, the lanes are based on "role" (who will execute the task). One lane is represented for each role. For example, consider the Workflow Diagram in Figure 5. The first step in transforming the Workflow Diagram into a Swimlane Diagram is to model the correct lanes.

Role	Customer Clerk	Customer Service Specialist	Product Technician

Figure:: Modeling the correct lanes.

However, it is important to realize that the driver for the lanes in a Swimlane Diagram may be Physical Environment, Application Interaction, Performance Support, etc. The driver for the lanes will depend on the view of the Business Process that is required. There can be multiple views of the same workflow, each focusing on a different driver.

- Sequentially model each task into the appropriate lane (ensuring that sequencing and linkages between tasks remain exactly the same as in the process models or Workflow Diagrams). For example, each task from the Workflow Diagram (Figure 5) is placed into the appropriate lane. (Figure 9)

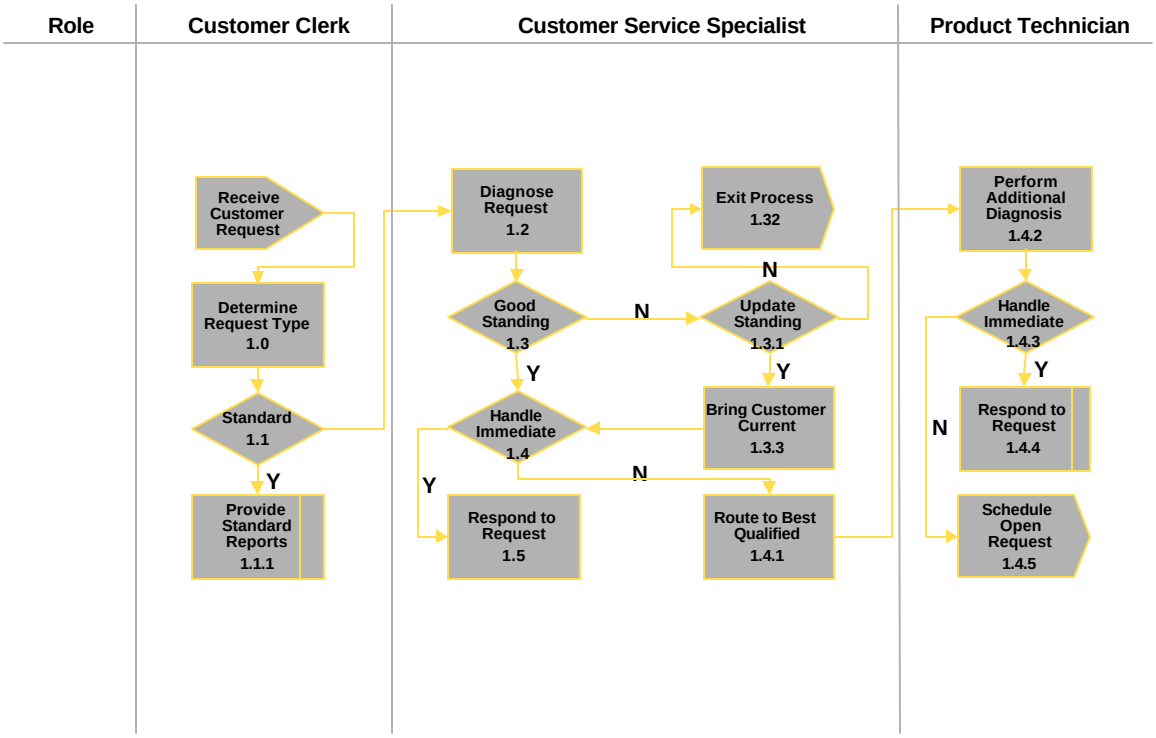


Figure: Lane Assignment.

- Add additional lanes to depict required supporting information. For example, the Swimlane Diagram in Figure 10 has lanes related to Skills, Performance Support, Application Interaction and Physical Environment added to provide supporting information and provide design teams with a starting point for design.

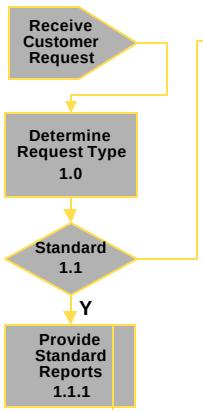
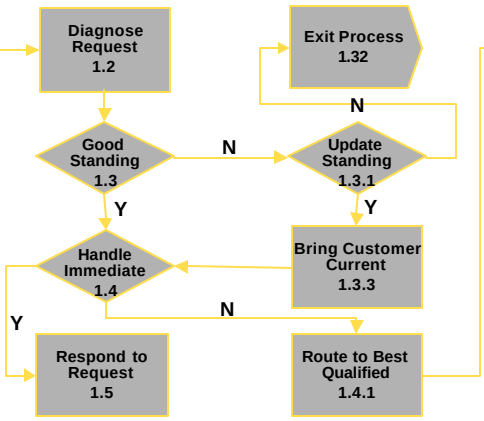
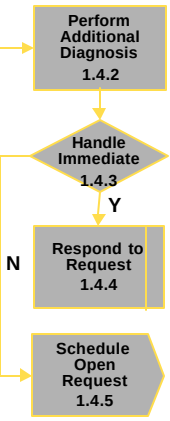
Role	Customer Clerk	Customer Service Specialist	Product Technician
Skills		Customer Service Mentality Problem Solving Customer Management General Subject Knowledge	Problem Solving
Performance Support		Knowledge Capital Products	Knowledge Capital Products
			
Application	Voice Response List Customer Database Call Tracking Request Roles & Routes	Customer Database Request Roles & Routes Call Tracking Billing Flexibility	Call Tracking Customer Database
Physical Environment	Call Center – London Voice Response Unit – Glasgow	Call Center – London Voice Response Unit – Glasgow	

Figure: Swimlane Diagram

- Validate the Swimlane Diagram against the process model or Workflow Diagram (and other supporting information from the Business Process Design) to ensure that the flow of tasks and dependencies remain stable.